

AB 1103 Disclosure Process

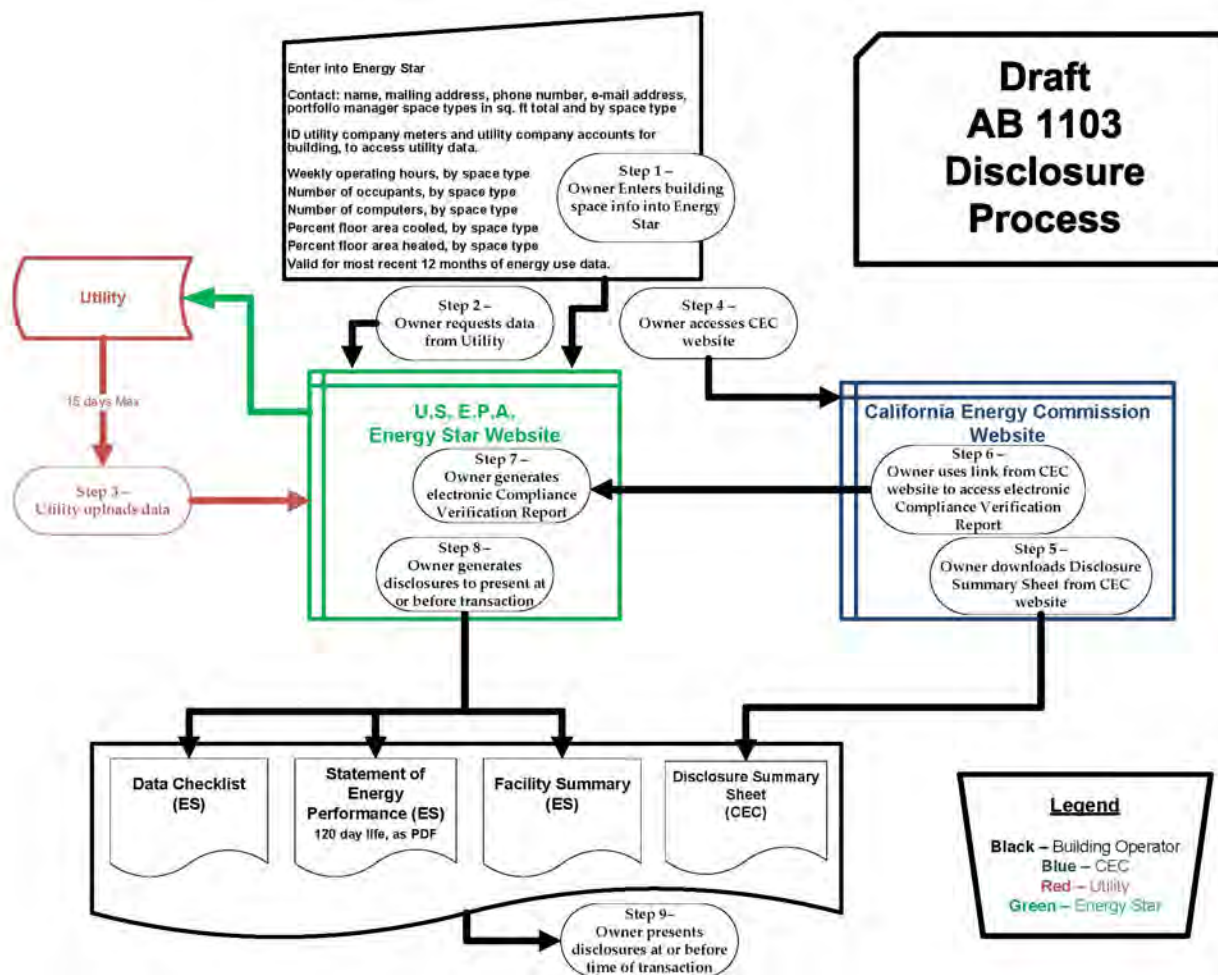
Staff Workshop
Hearing Room A

September 12, 2011

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Overview of AB 1103 Process



Major Steps of Disclosure

- 1) Owner opens a Energy Star Portfolio Manager account, inputs space usage information
- 2) Owner selects Service provider, allows access to account
- 3) Utility Uploads Energy Usage Data to Energy Star Portfolio Manager
- 4) Owner accesses CEC website
- 5) Owner downloads the Disclosure Summary Sheet
- 6) Owner uses link from CEC website to access ESPM
- 7) Owner submits Compliance Verification Report within ESPM
- 8) Owner generates ESPM standard forms to use for disclosure
- 9) Owner presents four documents at or prior to transaction
 - 1) Disclosure Summary Sheet
 - 2) Statement of Energy Performance
 - 3) Data Checklist
 - 4) Facility Summary

In this presentation, the step number is indicated in **green** in the upper right corner



Energy Star Portfolio Manager Page

(http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager)

BATTLE OF THE BUILDINGS
EPA's NATIONAL BUILDING COMPETITION
MIDPOINT TOP CONTENDERS ANNOUNCED!

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ENERGY STAR

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- Higher Education
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- Small Business
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Portfolio Manager Overview

Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment. Whether you own, manage, or hold properties for investment, Portfolio Manager can help you set investment priorities, identify under-performing buildings, verify efficiency improvements, and receive EPA recognition for superior energy performance.

How can Portfolio Manager help me?

- ✦ **Manage Energy and Water Consumption for all Buildings**
- ✦ **Rate Building Energy Performance**
- ✦ **Estimate Your Carbon Footprint**
- ✦ **Set Investment Priorities**
- ✦ **Verify and Track Progress of Improvement Projects**
- ✦ **Gain EPA Recognition**
- ✦ **Related Tools**

Manage Energy and Water Consumption for All Buildings

Portfolio Manager helps you track and assess energy and water consumption within individual buildings as well as across your entire building portfolio. Enter energy consumption and cost data into your Portfolio Manager account to benchmark building energy performance, assess energy management goals over time, and identify strategic opportunities for savings and recognition opportunities. EPA has developed a [Benchmarking Starter Kit](#) to help you get started quickly.

News

- New!** EPA Announces Top Contenders in ENERGY STAR National Building Competition
- City of Houston Wins Mayors' Climate Protection Award

2011 Buildings & Plants News Room

Portfolio Manager Log In

Username:

Forgot your username?

Password:

Forgot Your Password?

New User? Register

Login

Selected Resources

ENERGY STAR Benchmarking



Adding Space types

Portfolio Manager - Building View

www.energystar.gov/star/pmpam/index.cfm?fuseaction=bldg.view_bldg_info

Select my Power Generation Plant to calculate my electric emissions rate
Electric Emissions Rate (kgCO₂e/MBtu): 90.9 ([what is this?](#))

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

Water Period Ending Dates	Energy Period Ending Dates
Current: N/A	Current: April 2011
Baseline: N/A	Baseline: December 2003

Eligibility for the ENERGY STAR

Eligible to Apply for the ENERGY STAR

Facility Performance

Select View: Summary: Energy Use [Create View](#) | [Edit View](#)

12 Months Ending	Current Rating (1-100)	Current Site Energy Intensity (kBtu/Sq. Ft.)	Current Source Energy Intensity (kBtu/Sq. Ft.)	Change from Baseline: Energy Use Intensity (kBtu/Sq. Ft.)	Change from Baseline: Adjusted Energy Use Intensity (kBtu/Sq. Ft.)	Energy Use Alerts
May 2011	N/A	N/A	N/A	2.0	2.6	Less than 1 year of data
Select Date						

Change

REFRESH VIEW

Space Use

Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts
Computer Data Center	Data Center	504	0	Estimates used for IT energy load more info
Office	Office	144,468	99	
Other	Other - Other	504	0	
Total		145,476	99	

Because more than 50% of your building is Office, your building is designated as Office within Portfolio Manager. This building may be eligible for a GreenPower contract. ([Click here to learn more](#)) If you are a GreenPower customer for this building, please note that the rating takes into account the use of GreenPower.

General Facility Administration

[Contact us](#)

Sharing Data

[View](#) entire Access List for this Facility
[Remove](#) my access to this facility

Applying for the ENERGY STAR

[View](#) status of ENERGY STAR Applications

Building Profiles



Selecting a Utility Service Provider

The screenshot shows the Energy Star Portfolio Manager interface. The top navigation bar includes links for ACCOUNT INFORMATION, CONTACTS, FAQ, FREQUENTLY ASKED QUESTIONS, CONTACT US, HELP, and LOGOUT. The main content area is titled 'PORTFOLIO MANAGER' and includes a 'Home > My Portfolio' breadcrumb. A 'Portfolio Averages' table shows a Baseline Rating of 5 (2 facilities) and a Current Rating of 6 (3 facilities), with a 0% change in adjusted energy use. To the right, there are links for 'Add a Property', 'Import Facility Data Using Templates', 'Work with Facilities', 'Reporting and Analysis', and 'Apply for Recognition'. The 'Automated Benchmarking' link is circled in red. Below this, a table lists facilities with columns for Facility Name, Current Rating, Change from Baseline, Total Floor Space, Energy Use Alerts, Current Energy Period Ending Date, Eligibility for the ENERGY STAR, and Last Modified. The table shows three facilities: '123', 'blank office', and 'dummy facility'.

Portfolio Averages

Baseline Rating: 5 Facilities Included: 2	Current Rating: 6 Facilities Included: 3
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0% Facilities Included: 2	
Averages are weighted by Total Floor Space. More about Baselines More about Change from Baseline: Adjusted Energy Use	

[Add a Property](#)
[Import Facility Data Using Templates](#)

Work with Facilities
[Update Multiple Meters](#)
[Share Facilities](#)

Reporting and Analysis
[New! Generate Reports and Graphs](#)
[Request Energy Performance Report](#)

Apply for Recognition
[Apply for the ENERGY STAR](#)
[ENERGY STAR Leaders](#)

Automated Benchmarking
[Get Started Now](#)

GROUP: All Facilities [Create Group](#) | [View All](#) VIEW: Summary: Facilities [Create View](#) | [Edit View](#) | [View All](#)

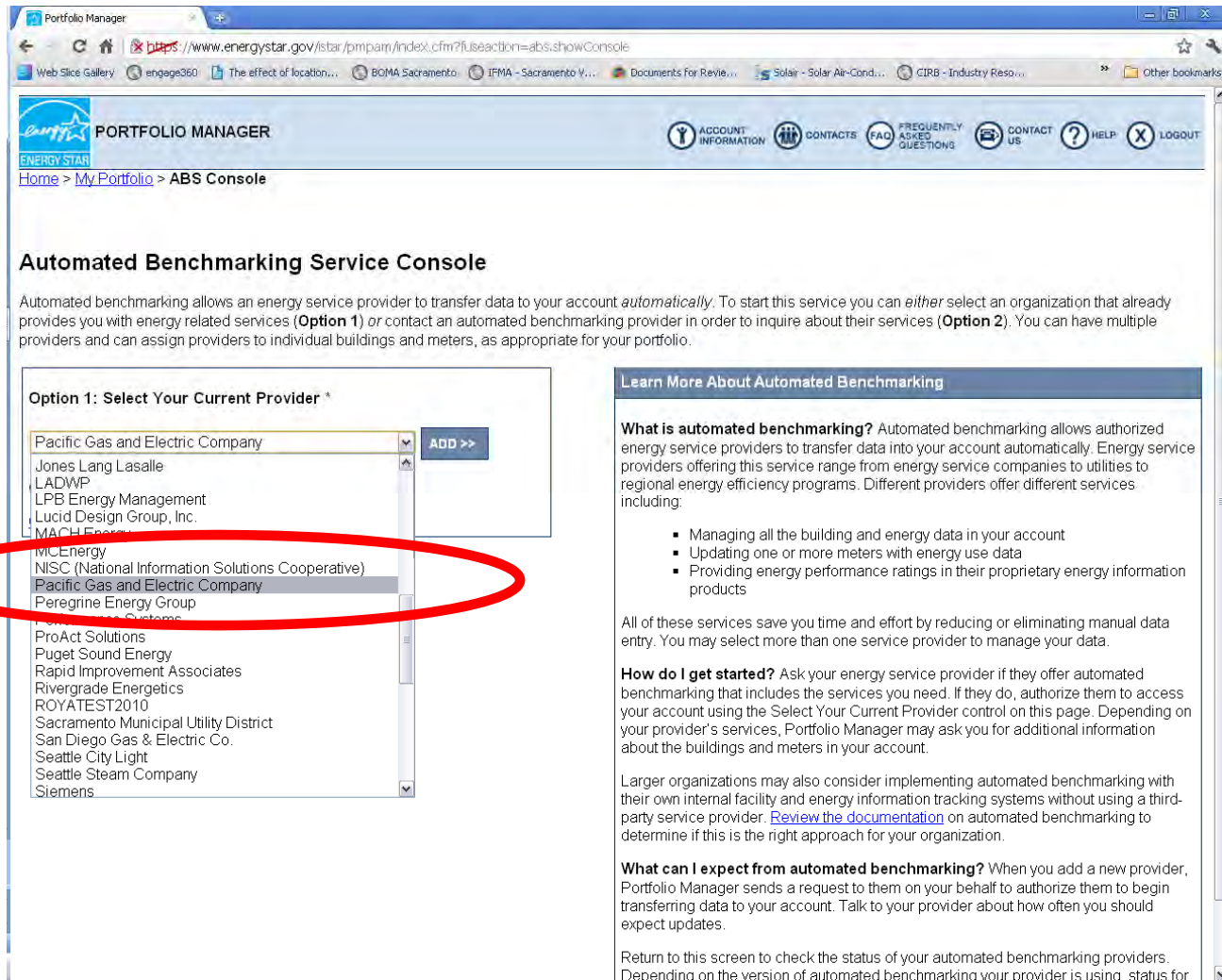
[Download in Excel](#) Search Facility Name: [Search](#)

Results 1 - 5 of 5 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Facility Name <input type="checkbox"/>	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date	Eligibility for the ENERGY STAR	Last Modified
123	N/A	N/A	0			N/A	
blank office	N/A	N/A	0			N/A	
dummy facility	78	0	30,000		05/31/2011	Apply for the ENERGY STAR	06/29/2011



Select Provider



Portfolio Manager

Home > My Portfolio > ABS Console

Automated Benchmarking Service Console

Automated benchmarking allows an energy service provider to transfer data to your account *automatically*. To start this service you can *either* select an organization that already provides you with energy related services (**Option 1**) or contact an automated benchmarking provider in order to inquire about their services (**Option 2**). You can have multiple providers and can assign providers to individual buildings and meters, as appropriate for your portfolio.

Option 1: Select Your Current Provider *

Pacific Gas and Electric Company **ADD >>**

- Jones Lang Lasalle
- LADWP
- LPB Energy Management
- Lucid Design Group, Inc.
- MACH Energy
- MidEnergy
- NISC (National Information Solutions Cooperative)
- Pacific Gas and Electric Company**
- Peregrine Energy Group
- ProAct Solutions
- Puget Sound Energy
- Rapid Improvement Associates
- Rivergrade Energetics
- ROYATEST2010
- Sacramento Municipal Utility District
- San Diego Gas & Electric Co.
- Seattle City Light
- Seattle Steam Company
- Siemens

Learn More About Automated Benchmarking

What is automated benchmarking? Automated benchmarking allows authorized energy service providers to transfer data into your account automatically. Energy service providers offering this service range from energy service companies to utilities to regional energy efficiency programs. Different providers offer different services including:

- Managing all the building and energy data in your account
- Updating one or more meters with energy use data
- Providing energy performance ratings in their proprietary energy information products

All of these services save you time and effort by reducing or eliminating manual data entry. You may select more than one service provider to manage your data.

How do I get started? Ask your energy service provider if they offer automated benchmarking that includes the services you need. If they do, authorize them to access your account using the Select Your Current Provider control on this page. Depending on your provider's services, Portfolio Manager may ask you for additional information about the buildings and meters in your account.

Larger organizations may also consider implementing automated benchmarking with their own internal facility and energy information tracking systems without using a third-party service provider. [Review the documentation](#) on automated benchmarking to determine if this is the right approach for your organization.

What can I expect from automated benchmarking? When you add a new provider, Portfolio Manager sends a request to them on your behalf to authorize them to begin transferring data to your account. Talk to your provider about how often you should expect updates.

Return to this screen to check the status of your automated benchmarking providers. Depending on the version of automated benchmarking your provider is using, status for



Agree to Terms

Portfolio Manager

https://www.energystar.gov/istar/pmparm/index.cfm?fuseaction=abs.showTermsConditions&esp_userid=PACIFICGASELECTRIC

Web Slice Gallery engage360 The effect of location... BOMA Sacramento IFMA - Sacramento V... Documents For Review Solair - Solar Air-Cond... CIRB - Industry Reso... Other bookmarks

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

[Home](#) > [My Portfolio](#) > **ABS Terms of Use**

Terms of Use

Authorization for Pacific Gas and Electric Company to transfer data to your account

Terms of Use

In the U.S. Environmental Protection Agency's (EPA) national energy performance benchmarking program, an element of the ENERGY STAR program.

I understand, on behalf of Customer, that the EPA requires information about Customer's facility (which Customer will provide directly to the EPA), and also Customer's monthly utility billing data and other data as may be required by Portfolio Manager in order to calculate Customer's

Agreement* ☒ I agree to my provider's Terms of Use

Important Privacy Information

By authorizing this energy service provider, you are agreeing to provide them with access to edit and view data within your account. This energy service provider will only be able to access the buildings that they add directly into your account or the buildings and/or meters that you have explicitly assigned to them. You can de-authorize an energy service provider at any time by adjusting the automated benchmarking settings in your Portfolio Manager account.

<< BACK CONTINUE >>



Authorize Utility to Update Data

Portfolio Manager

<https://www.energystar.gov/istar/pmpam/index.cfm>

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PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > ABS Select Access Level

Data Release Authorization Access Level

What level of access do you want to give your Energy Service Provider (ESP), Pacific Gas and Electric Company?

Level of Access

- ☐ Add new buildings in my portfolio
- ☒ Add new buildings and update existing buildings in my portfolio

<< BACK CONTINUE >>



Select Facility to Allow Access

Portfolio Manager

https://www.energystar.gov/istar/pmpam/index.cfm

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PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > ABS Select Facilities/Campuses to Change Authorization

Select Facilities/Campuses to Change Authorization

Select facilities/campuses to change the Automated Benchmarking authorization for Pacific Gas and Electric Company. Use the checkbox in the far left column to select the appropriate facilities/campuses and click the "Update List" button to add these to your list of Selected Facilities/Campuses.

Please note that you can only change the authorization for a maximum of 50 facilities/campuses at a time. If you have more than 50 facilities/campuses you may return to this screen and repeat the process for the additional facilities/campuses.

See [Authorizing an Energy Service Provider](#) for more information.

CANCEL UPDATE LIST CONTINUE >>

Results 1 - 5 of 5 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select Facility/Campus	Facility/Campus Name ▾	Building/Campus ID	Meter Authorizations	Selected Facilities/Campuses # Selected (Max 50)
<input type="checkbox"/>	123	2820322	View Meter Authorizations	
<input checked="" type="checkbox"/>	Sample Facility	2735681	View Meter Authorizations	
<input type="checkbox"/>	blank office	2789602	View Meter Authorizations	
<input type="checkbox"/>	dummy facility	2736055	View Meter Authorizations	

Results 1 - 5 of 5 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

CANCEL UPDATE LIST CONTINUE >>



Select Meters to Allow Access

Portfolio Manager

www.energystar.gov/istar/pmpain/index.cfm?fuseaction=abs.showSelectAuthorizations_V2&esp_userid=PACIFICGASELECTRIC&updatebuildings=Y&SelectedFacilitiesList=

ENERGY STAR

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > ABS Select Buildings and Meters

Select Buildings and Meters to Authorize

Select buildings and/or meters you authorize Pacific Gas and Electric Company to access. You have three basic authorization options:

- 1) **Read/Write** access to building level data authorizes your service provider to read(retrieve) and write (update) facility and space data.
- 2) **Read/Write** access to meter level data authorizes your service provider to retrieve and update meter level data. Selecting this option also gives your service provider read/write access to building level data.
- 3) **Read-Only** access to meter level data authorizes your service provider to retrieve meter level data. Selecting this option also gives your service provider read/write access to building level data.

Please note that if there are multiple ABS Providers managing the same building, then there is the possibility of building information (which includes building level and space information - but not meter information) being overwritten.

You may return to this screen at any time to change these selections. Please note that de-selecting a building or meter after your service provider has successfully connected to it will remove their ability to provide data for it altogether.

Select the Buildings and/or Meters You Authorize Your ESP to Provide Data

<< BACK CONTINUE >>

Select All	Authorized Energy Service Provider	Date Authorized (Authorized By)
<input checked="" type="checkbox"/> dummy facility		
dummy electrical (Electricity) <input type="radio"/> None <input checked="" type="radio"/> Read/Write <input type="radio"/> Read Only		
dummy solar to grid (Electricity) <input type="radio"/> None <input checked="" type="radio"/> Read/Write <input type="radio"/> Read Only		
Dummy Nat Gas (Natural Gas) <input type="radio"/> None <input checked="" type="radio"/> Read/Write <input type="radio"/> Read Only		
dummy solar (Electricity) <input type="radio"/> None <input checked="" type="radio"/> Read/Write <input type="radio"/> Read Only		

<< BACK CONTINUE >>



Input Utility Specific Data

Portfolio Manager

https://www.energystar.gov/istar/jmpam/index.cfm

Web Slice Gallery engage360 The effect of location... BOMA Sacramento IFMA - Sacramento V... Documents for Review... Solar - Solar Air-Cond... CIRB - Industry Reso... Other bookmarks

Information Required by Your ESP

Pacific Gas and Electric Company has requested that you provide additional information to complete this request. If you have any questions regarding how to provide this information, please contact:

Pacific Gas and Electric Company
PG&E Benchmarking Customer Support
415-973-3766
[Email](#) | [Web Site](#)

<< BACK CONTINUE >>

Answer Your ESP's Questions About Your Account

Building Representative Email Address *

Building Representative Email Address
Between 7 and 50 characters

dummy facility

For the Electricity meter named dummy electrical

Service ID *

Example: 0123456789
[More Information](#) Numeric; 10 characters

For the Electricity meter named dummy solar to grid

Service ID *

Example: 0123456789
[More Information](#) Numeric; 10 characters

For the Natural Gas meter named Dummy Nat Gas

Service ID *

Example: 0123456789
[More Information](#) Numeric; 10 characters

For the Electricity meter named dummy solar

Service ID *

Example: 0123456789



ABS Console

Portfolio Manager
Home > My Portfolio > ABS Console

Automated Benchmarking Service Console

Automated benchmarking allows an energy service provider to transfer data to your account *automatically*. To start this service you can *either* select an organization that already provides you with energy related services (**Option 1**) or contact an automated benchmarking provider in order to inquire about their services (**Option 2**). You can have multiple providers and can assign providers to individual buildings and meters, as appropriate for your portfolio.

Option 1: Select Your Current Provider *

Select an Energy Service Provider

Option 2: Inquire About New Services

[Contact an automated benchmarking provider](#)

Learn More About Automated Benchmarking

[About Automated Benchmarking](#)
[Service Providers that Offer Automated Benchmarking](#)

Existing Providers

[Show Activity Log](#)

Provider	Energy Service Provider Status	Items Authorized for Automated Benchmarking
Pacific Gas and Electric Company PG&E Benchmarking Customer Support 415-973-3766 Ts & Cs Email Web Site	Connection to ESP Requested - Awaiting ESP Response	1 Facilities/Campuses Change Authorization

When the status reads as shown above, the account is ready for utility upload of energy use data



Step 3

- Once owner has uploaded space types, they request that the utility release Energy Use data into ESPM
- Utility may verify this request prior to honoring it, but must upload within 15 days of original request
- Data will be aggregated by Utility prior to upload
- Once Utility has uploaded data, building owner is ready to generate disclosure documentation



Draft Web Page Layout

The screenshot displays the California Energy Commission website. The browser address bar shows the file path: file:///C:/1103/Mock%20Disclosure%20Page10.htm. The website header includes the California Energy Commission logo and navigation links: Home, Reports & News, Climate Change, Efficiency, Electricity & Nat Gas, Local Govt., Power Plants, Renewable Energy, R & D, Transmission, Transportation, Funding. A search bar is located in the top right corner.

The main content area is titled "AB 1103 Disclosure Documentation". It states: "THE DISCLOSURE OF THE FOLLOWING FOUR ITEMS TO THE BUYER, LESSEE, OR LENDER IS REQUIRED TO ACHIEVE COMPLIANCE". The items listed are:

- 1) Summary of California Median Energy Use Intensities ([right click here to download](#))
- 3) Statement of Energy Performance (downloaded from the Energy Star Portfolio Manager)
- 4) Data Checklist (downloaded from ESPM)
- 5) Facility Summary (downloaded from ESPM)

Below this, it states: "IN ORDER TO MONITOR COMPLIANCE, THE COMMISSION REQUIRES THE ELECTRONIC SUBMISSION OF A DISCLOSURE VERIFICATION REPORT".

1) Please click on this [link](#) to be taken to the ESPM site and submit the Disclosure Verification Report

Implementation of these regulations will proceed according to the following timetable:

- On or after July 1, 2012, for a building with total floor space measuring more than 50,000 square feet.
- On or after January 1, 2013, for a building with a total floor space measuring between 10,000 and 49,999 square feet.
- On or after July 1, 2013 for a building with a total floor space measuring between 1,000 and 9,999 square feet.

For more information, please contact:

Justin Regnier
California Energy Commission
1516 Ninth Street
Sacramento, Ca. 95814
(916) 654-4196
JRegnier@energy.state.ca.us

News media, please call: Media & Public Communications Office - 916-654-4989.

The right sidebar contains a calendar for August 2011, a list server subscription form, and a list of related programs and proceedings.

Related Programs & Proceedings:

- Go Solar California
- SB1
- AB 758 Energy Efficiency in Existing Buildings
- Title 24 Building Standards
- Green Building Initiative
- Climate Action Team

Calendar:

August 05, 2011
[Webinar: Energy Star & Green Plumbers - High Efficiency Water Heaters](#)

List Server:

To subscribe to the Efficiency List Server, enter your e-mail address completely:

Enter first name
Enter last name
Enter your e-mail

Note: Your first & last name and e-mail address must be exact and complete. Incorrect or incomplete addresses will not work. You will receive a confirmation e-mail to confirm your subscription.

Send Reset

Footer:

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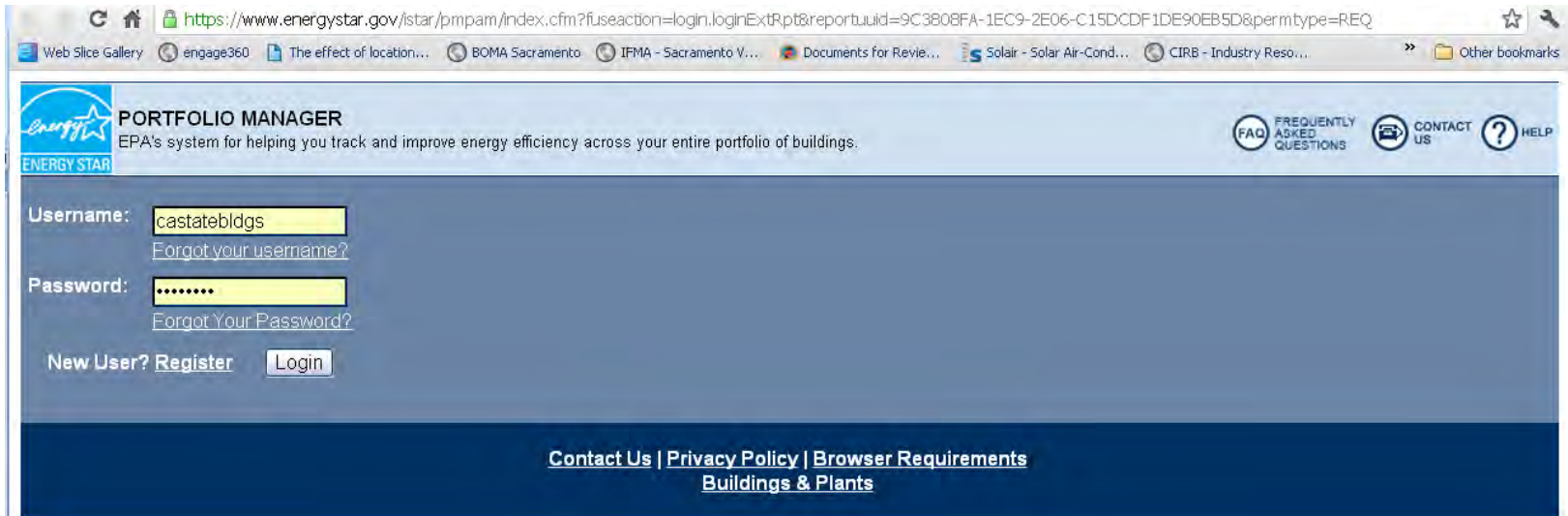
[Conditions of Use](#) | [Privacy Policy](#)

[Decisions Pending and Opportunities for Public Participation](#)

Copyright © 1994-2011 California Energy Commission. All Rights Reserved



Energy Star Reporting Login



The screenshot shows the Energy Star Portfolio Manager login page. The browser address bar displays the URL: <https://www.energystar.gov/istar/pmpam/index.cfm?fuseaction=login.loginExtRpt&reportuid=9C3808FA-1EC9-2E06-C15DCDF1DE90EB5D&permtype=REQ>. The page header includes the Energy Star logo, the title "PORTFOLIO MANAGER", and a description: "EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings." Navigation links for "FAQ", "FREQUENTLY ASKED QUESTIONS", "CONTACT US", and "HELP" are visible. The login form contains fields for "Username:" (with the value "castatebldgs") and "Password:" (masked with dots). Below the password field is a "Forgot Your Password?" link. At the bottom of the form are links for "New User? Register" and a "Login" button. A footer bar contains links for "Contact Us", "Privacy Policy", "Browser Requirements", and "Buildings & Plants".

PORTFOLIO MANAGER
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

Username:
[Forgot your username?](#)

Password:
[Forgot Your Password?](#)

New User? [Register](#)

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#)
[Buildings & Plants](#)



Read Instructions for Reporting and Click OK

Step 7

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/ia/external_reporting/index.cfm?fuseaction=app.TabularDisplay&reportid=1012397

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report

Quick Reference Guide

Report Template: AB 1103 Compliance Verification Report

Save as Default Filter for this Report

0 Matching Facilities. 0 Rows Returned

Reporting Period

☒ Single Period (one period)

☐ Comparative (two periods)

☐ Range (all periods within date range)

Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:

Location

☒ U.S. only ☐ All Countries

All Locations

California

Virginia

OR, Select specific Cities or Zip Codes

Facility Type

All Facility Types

Office

Template Instructions

The following instructions were provided by Justin Regnier (California Energy Commission) for using AB 1103 Compliance Verification Report:

Electronic submission of this Compliance Verification Report is required to meet disclosure requirements.

In order to accomplish this, please do the following:

- 1) Select a time period that gives at least the last 12 months of data (if you submit insufficient data, this will void the disclosure)
- 2) Select the building that you would like to submit data for from the box, or type in the building name
- 3) Select the release data button
- 4) Enter contact information in case the Utility needs to contact you
- 5) Confirm data release
- 6) If you would like a copy of the report, enter an e-mail address and select the desired data format

A detailed presentation giving step by step instruction for this process can be downloaded from:
http://www.energystar.gov/ia/external_reporting/index.cfm?fuseaction=app.TabularDisplay&reportid=1012397

Once you have completed the above, please return to your portfolio, select your building and generate the following:

- 1) Statement of Energy Performance
- 2) Data Checklist
- 3) Facility Summary

The above three documents shall be attached to the Disclosure Summary Sheet and provided according to the timetable outlined in sections 1603-4 of Title 20, Division 2, Chapter 4, Article 9 of the California Code of Regulations.

Remember, in the future you will be able to access this report from the "Generate Reports and Graphs" link on your "My Portfolio" page.

OK

Page 1 of 1

REFRESH DATA

No facilities to display

Internet 95%



Select Dates for Disclosure Period (at least the last 12 months)

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/external_reporting/index.cfm?useaction=app.T absoluteDisplay&reportid=1012937

Portfolio Manager - Generate a Report

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report

Quick Reference Guides

Report Template: AB 1103 Compliance Verification Report

Save as Default Filter for this Report Clear All Filters

1 Matching Facility 12 Rows Returned

Reporting Period

Single Period (one period)
Comparative (two periods)
Range (all periods within date range)

Jan 2010 Sep 2011

Facilities & Groups

Select Facilities or Groups (1 item)

OR, type in the name of a single facility

Location

U.S. only All Countries

All Locations
California
Virginia

OR, select specific Cities or Zip Codes

Facility Type

All Facility Types
Office

AB 1103 Compliance Verification Report January 2010 - September 2011

View Data Table View Graph

RELEASE DATA

View Instructions from Amy Sam

Don't see what you're expecting in your report?

REFRESH DATA View Full Screen Display Print/Friendly Export Data Set: Excel XML CSV PDF

Building ID	Facility Name	Period End	Rating	Address 1	Address 2	Administrator	Agency
2730055	dummy facility	01/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	10/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	03/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	06/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	08/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	07/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	04/30/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	11/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	09/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	12/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	05/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2730055	dummy facility	02/28/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A

Page 1 of 1

Displaying 1 - 12 of 12

REFRESH DATA



Select or Type in Name of Facility

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/istar/pmpen/external_reporting/index.cfm?fuseaction=app.TabularDisplay&reportid=1013397

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report

Quick Reference Guides

Report Template About Report Templates

AB 1103 Compliance Verification Report

Save as Default Filter for this Report Clear All Filters

1 Matching Facility 12 Rows Returned

Reporting Period

Single Period (one period)

Comparative (two periods)

Range (all periods within date range)

Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:

dummy facility

Location

All Locations

California

Virginia

OR, Select specific Cities or Zip Codes

Facility Type

All Facility Types

Office

AB 1103 Compliance Verification Report January 2010 - September 2011

View Data Table View Graph

RELEASE DATA

View Instructions from Any Page

Don't see what you're expecting in your report?

REFRESH DATA View Full Screen Display Printer-friendly Export Data Set: Excel | XML | CSV | PDF

Building ID	Facility Name	Period End	Rating	Address 1	Address 2	Administrator	Agency
2736055	dummy facility	01/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	02/28/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	03/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	04/30/2011	78	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	05/31/2011	78	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	06/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	07/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	08/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	09/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	10/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	11/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	12/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A

Page 1 of 1

Displaying 1 - 12 of 12

REFRESH DATA



Release Data

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/external_reporting/index.cfm?fuseaction=app.tutorialDisplay&reportid=1012397

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home Folders Read Mail

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US ? HELP X LOGOUT

Home > My Portfolio > Generate a Report

Quick Reference Guides

Data Current As Of: August 23, 2011 12:30 AM

Report Template About Report Templates

AB 1103 Compliance Verification Report

Save as Default Filter for this Report Clear All Filters

1 Matching Facility 12 Rows Returned

Reporting Period

Single Period (one period)
Comparative (two periods)
Range (all periods within date range)

Jan 2010 Sep 2011

Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:
dummy facility

Location

U.S. only All Countries

All Locations
California
Virginia

OR, Select specific Cities or Zip Codes

Facility Type

All Facility Types
Office

AB 1103 Compliance Verification Report January 2010 - September 2011

View Data Table View Graph

RELEASE DATA

View Instructions from Amy Sam
Don't see what you're looking for in your report?

REFRESH DATA View Full Screen Display Print-friendly Export Data Set: Excel XML CSV PDF

Building ID	Facility Name	Period End	Rating	Address 1	Address 2	Administrator	Agency
2736055	dummy facility	01/31/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	02/28/2011	N/A	123 dummy...	N/A	JREGNIER@...	N/A
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2736055	dummy facility	11/30/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A
2736055	dummy facility	12/31/2010	N/A	123 dummy...	N/A	JREGNIER@...	N/A

Page 1 of 1

Displaying 1 - 12 of 12

REFRESH DATA



Enter Contact Information and Release

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/istar/pmpam/external_reporting/index.cfm

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home Fabos (1) Read Mail

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report > Custom Reports Templates > Data Release Confirmation

Data Release Confirmation

You are about to release a copy of this data to Justin Regnier. If you have previously released data to Justin Regnier from this Portfolio Manager account please note that:

- Buildings in this release only will be submitted to Justin Regnier with the data in this release.
- Buildings in your previous release only will be still be submitted to Justin Regnier with the original data and date stamp.
- Buildings in both releases will be updated with the data from this current, more recent release.

Your Contact Information
This allows Justin Regnier to know who to contact in case of questions about this data.

☒ REQUIRED

*First Name: Joe
*Last Name: Cool
*Organization: State of California
*Email Address: jcool@state.ca.us
*Phone: 818 555 1212

CANCEL RELEASE



Confirm Release

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/listar/jmpam/external_reporting/index.cfm

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home Feeds (1) Read Mail

ENERGY STAR PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report > Custom Reports Templates > Data Release Confirmation

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Your Contact Information
This allows Justin Regnier to know who to contact in case of questions about this data.

☒ REQUIRED

*First Name: Joe
*Last Name: Cool
*Organization: State of California
*Email Address: jcool@state.ca.us
*Phone: 916 555 1212

RELEASE

Release Data to Data Requestor

Are you sure you want to release data to Justin Regnier?

Yes

Done

Internet 95%



Select Format and Input Confirmation E-mail (Optional)

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/istar/jmpdan/external_reporting/index.cfm

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home | Profile | Read Mail

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report

Release Confirmation

Your data was released to **Justin Regnier** on **August 8, 2011**. If you would like a confirmation email sent to you or another party along with a copy of the data released, provide that email address below.

OPTIONAL - Send a Confirmation email

Enter Email Address(es):
(use a comma(,) and/or semi-colon(;)) to separate email addresses)

Select File Type for Data:

(Please note: Any file that exceeds 10 MB will be compressed as a .zip file prior to sending.)

☐ Excel
☐ XML
☐ CSV
☐ PDF

DONE



Select Format and Input Confirmation E-mail (Optional)

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/istar/jmpdan/external_reporting/index.cfm

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home | Profile | Read Mail

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report

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Select File Type for Data:

(Please note: Any file that exceeds 10 MB will be compressed as a .zip file prior to sending.)

☐ Excel
☐ XML
☐ CSV
☐ PDF

DONE



Return to Your Portfolio and Select Your Building

Step 8

Portfolio Manager - Generate a Report - Windows Internet Explorer

https://www.energystar.gov/etar/pmpam/external_reporting/index.cfm?fuseaction=app.TabularDisplay&reportid=10123978&dmaster=false

File Edit View Favorites Tools Help

Portfolio Manager - Generate a Report

Home Reports Read Mail

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate Report

Quick Reference Guides

Data Current As Of: August 23, 2011 12:30 AM

Report Template: About Report Templates

AB 1103 Compliance Verification Report

Save as Default Filter for this Report Clear All Filters

0 Matching Facilities 0 Rows Returned

Reporting Period

Single Period (one period)

Comparative (two periods)

Range (all periods within date range)

Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:

Location

U.S. only All Countries

All Locations

California

Virginia

OR, Select specific Cities or Zip Codes

Facility Type

All Facility Types

Office

AB 1103 Compliance Verification Report

View Data Table View Graph

RELEASE DATA

View Instructions from Admin Site

Don't see what you're expecting in your report?

REFRESH DATA View Full Screen Display Printfriendly Export Data Set: Excel | XML | CSV | PDF

Building ID	Facility Name	Period End	Rating	Address 1	Address 2	Administrator	Agency
No facilities to display							

REFRESH DATA

Page 1 of 1



Generate a Statement of Energy Performance

Portfolio Manager - Building View - Windows Internet Explorer

https://www.energystar.gov/istar/pmpant/index.cfm?fuseaction=bldg.view_bldg_init

File Edit View Favorites Tools Help

Portfolio Manager - Building View

PORTFOLIO MANAGER

Home > My Portfolio > dummy facility

Facility Summary: **dummy facility**
[How do I use this page?](#)

Building ID: 2736055
Level of Access: Facility/Profile Editor
Access Provided by: Justin Regnier

Electric Distribution Utility: Sacramento Municipal Utility District
Regional Power Grid: [WECC California](#)
[Select my Power Generation Plant](#) to calculate my electric emissions rate
[Electric Emissions Rate \(kgCO₂/kWh\)](#) [What's this?](#)

Generate a Statement of Energy Performance for use other than applying for the ENERGY STAR

General Information [Edit](#)

Address: 123 dummy lane, dummytown, CA 95817

Year Built: 1992

Property Type: Single Facility

Baseline Rating: 78 Current Rating: 78

View Period Ending Dates

Water Period Ending Dates
Current: N/A
Baseline: N/A

Energy Period Ending Dates
Current: May 2011
Baseline: May 2011

Eligibility for the ENERGY STAR
Eligible to [Apply for the ENERGY STAR](#)

Facility Performance [Set Baseline Periods](#) [Set Energy Performance Target](#)

Select View: Performance: Data Centers [Create View](#) [Edit View](#)

12 Months Ending	Current Rating (1-100)	Current Energy Period Ending Date	Current Data Center Source PUE	Current Source IT Energy (kBtu)	Current Total Source Energy Use (kBtu)	Current Source Energy Intensity (kBtu/Sq. Ft.)
May 2011	78	05/31/2011	N/A	N/A	3,356,224.3	111.9
Select Date		N/A				

Change

[REFRESH VIEW](#)

Space Use [Add Space](#)

Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts
back warehouse	Warehouse (Unrefrigerated)	5,000	17	Delete Space

General Facility Administration
[Track](#) Energy Performance Improvements
[Create](#) this Facility from Portfolio Manager
[Contact](#) us



Select Period and Reports to be Generated

Step 8

Portfolio Manager - Windows Internet Explorer

https://www.energystar.gov/istat/company/index.cfm?fuseaction=sep.showSummaryReportDateSelect

File Edit View Favorites Tools Help

Home > My Portfolio > dummy facility > Statement of Energy Performance and Data Checklist (for uses other than applying for the ENERGY STAR)

Statement of Energy Performance and Data Checklist (for uses other than applying for the ENERGY STAR)

The Statement of Energy Performance and Data Checklist (for uses other than applying for the ENERGY STAR) provide a comparative view of your facility's energy performance and environmental impact for the 12-month Period Ending Date selected below.

The Data Checklist provides a summary of a property's physical and operating characteristics, as well as its total energy consumption.

The document can be read using Adobe Acrobat reader. If you do not have the free reader, you can download it from the [Adobe Web site](#).

Use this statement as appropriate to document your facility's energy performance for important activities such as:

- LEED for Existing Buildings (LEED-EB) applications
- Mortgage, sale, and/or lease transactions
- Energy service company performance contracts
- Tenant/owner/customer communications
- Display of energy performance

PLEASE NOTE: NOT FOR USE WHEN APPLYING FOR THE ENERGY STAR. [Learn more](#) about applying for the ENERGY STAR.

REQUIRED

Indicate the Period Ending Date for which to Generate this Statement

*Period Ending Date: Select Period Ending

Optional Contact Information:

Select the Organization that owns this facility: Select Contact

Select the Primary Point of Contact for this statement: Select Contact

Select the Certifying Professional for this statement: Select Contact

[Add/Edit Contacts and Organizations](#)

Report Options:

* Select one or more of the following options:

- ☒ Statement of Energy Performance (for uses other than applying for the ENERGY STAR)
- ☒ Data Checklist
- ☒ Facility Summary
- ☐ Statement for Display Purposes (Only for buildings with ratings - must select valid 12 month rating period)

CANCEL GENERATE REPORT



Save Report and Disclose

https://www.energystar.gov/istar/pmpam/index.cfm - Windows Internet Explorer


File Edit Go To Favorites Help

https://www.energystar.gov/istar/pmpam/index.cfm

Home Read Mail

130% Sign Print

OMB No. 2060-0347



STATEMENT OF ENERGY PERFORMANCE dummy facility

Building ID: 2736055
For 12-month Period Ending: May 31, 2011¹
Date SEP becomes ineligible: N/A

Date SEP Generated: August 08, 2011

Facility dummy facility 123 dummy lane dummytown, CA 95817	Facility Owner N/A	Primary Contact for this Facility N/A
--	------------------------------	---

Year Built: 1992
Gross Floor Area (ft²): 30,000

Energy Performance Rating² (1-100) 78


Site Energy Use Summary³

Electricity - Grid Purchase(kBtu)	823,998
Electricity - On-Site Solar(kBtu)	368,496
Natural Gas (kBtu) ⁴	225,000
Total Energy (kBtu)	1,417,494

Energy Intensity⁵

Site (kBtu/ft ² /yr)	47
Source (kBtu/ft ² /yr)	112

Emissions (based on site energy use)



Done Unknown Zone

